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ABSTRACT

This organizational vignette is the second in a multi-part series highlighting community rehabilitation providers. This particular issue focuses on Columbia MetroWest Human Services of Ashland, Massachusetts, an organization that works with people with developmental disabilities and has undergone major transformation resulting in greatly expanded opportunities for individually focused employment and community support for people with severe disabilities. Steps in the change process are described and lessons to be learned are provided, including: (1) leadership needs to include both a strong philosophical base to guide the agency's action and individuals willing to act and take risks; (2) having a detailed plan for the eventual structure of an agency is not necessary to begin the change process; (3) attitudes and beliefs get shaped by experience, and many agencies need to test the efficacy of old beliefs before they can adopt a new belief system; (4) staff, families, and funding agencies have a harder time adjusting to changes than individuals served; (5) during major organizational change, an agency should expect, and perhaps welcome personnel turnover; (6) major organizational change cannot be successful without marketing; and (7) in order to move ahead, difficult compromises must be made. (CR)

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Roses and Thorns: from the Grassroots

A Series Highlighting Organizational Change in Massachusetts

Institute for Community Inclusion (UAP) *Summer 1998, Volume 2*

Columbia MetroWest Human Services: A Study of Persistence, Planning, and Producing Change

The History

Columbia MetroWest Human Services was started in the early nineteen fifties by families to provide day and residential supports to children and adults with developmental disabilities. By 1985, the agency served over 300 individuals with more than 150 receiving day and employment services in a facility that included a sheltered workshop, pre-vocational and day habilitation programs. A small number of participants worked in the community in individual placements and group enclaves. With encouragement from its major funding source, the Department of Mental Retardation, the agency developed and implemented several plans to expand its supported employment services. However, no substantial gains were made in increasing the number of people working in community employment.

In 1990, another planning group was formed and a more substantive effort was made to address this situation. Outside consultants, including ICI, were brought in to take a critical look at the agency's structure and services, and the employment component was again redesigned in an effort to direct more resources and focus on community placement. Three departments were formed: **Production**, which included the sheltered workshop and sub-contract procurement; **Employment Services**, which was divided into 5 teams with each team given responsibility for supporting a group of individuals both in the workshop and in community employment; and **Developmental Services**, which included both pre-vocational and day habilitation programs. Substantial effort was spent on exploring various profit-making business opportunities within the workshop including developing an affirmative business.

The Catalyst

By 1992, several factors converged that forced the agency to take a serious look at its future. Despite the efforts of the previous seven years to expand

Introduction

This organizational vignette is the second in a multi-part series that the Institute for Community Inclusion has developed highlighting community rehabilitation providers with whom we have worked, whose efforts have been exemplary in terms of community employment outcomes for people with severe disabilities. Each issue features one organization whose work the Institute believes to be outstanding from a national perspective and whose story can provide other community rehabilitation providers with effective strategies for improving their community employment services. Each of these organizations has welcomed the advice, consultation (and criticism) of Institute staff and labored hard to form an effective technical assistance partnership in its efforts to make these changes.

The success that each of these service providers has achieved in the community employment process must be credited to the energy, motivation, strength, and resiliency of the people with disabilities, who have risked much more and worked much harder than any of us in taking steps to employment. Only after acknowledging that can we, as community rehabilitation organizations and training and technical assistance centers, take justifiable pride in whatever accomplishments have been achieved. This second issue spotlights Columbia MetroWest Human Services of Ashland, MA (formerly known as South Middlesex Arc). This is an organization working with people with developmental disabilities, which has undergone major organizational transformation resulting in greatly expanded opportunities for individually focused employment and community supports for people with severe disabilities. The agency has been a participant in two federally funded technical assistance grant projects run by the Institute and staff and management have been regular participants in Institute trainings and events.

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community employment, fewer than 30% of individuals served worked in the community. Funding sources had increased their demands for community employment, and the workshop was losing money. The agency would need to both triple production and make large capital investments in machinery to be profitable. SMARC was also exploring possibilities of a merger with a larger human service agency, but this could only occur if the agency's fiscal situation improved. Finally, a middle management team emerged who was outspoken in its commitment to expand community employment.

The core planning group comprised of the Executive Director and several management staff concluded that the agency could no longer afford to run both a workshop and supported employment program. Investing the capital and resources in running a profitable workshop was incompatible with both the mission and values of the agency, as well as the fiscal and political realities. The situation was presented to the Board of Directors with strong arguments from both the Executive Director and Finance Manager in support of the proposition of closing the workshop. In June of 1993, the board adopted a resolution to close the workshop in January 1994.

Step One In The Change Process

Starting in 1992, focus groups and meetings were held with consumers, families, staff and funding agencies to gather information about people's interests, needs, and concerns to assist in developing a plan of action for the agency. Individuals were given the choice to become involved in the new supported employment program, move to the Medicaid-funded day habilitation program, or receive assistance in finding another agency if they still wanted workshop services. Of the 147 people served in the vocational and pre-vocational programs, 33 individuals chose to enter an expanded day habilitation program. Another 14 individuals left the agency (2 retired, 2 left the area, and 10 chose to go to another workshop). A number of individuals and their families (with advice from funding agencies) declined to participate in the new employment program because of the uncertainty of day support services and the lack of adequate resources to provide services for people with more severe disabilities.

100 individuals chose to participate in the new supported employment services. The services were structured around five teams with a team leader and staff supporting between 15-20 individuals in a one to five staff to participant ratio. Since 70% of the people served in the program were not employed at this time, a major concern was what individuals would do during the day. When the decision was made to close the workshop, the promise was made to continue to provide community-based day support for all individuals who requested it. The agency developed several satellite sites throughout the community serving as central meeting places for transportation and as places to run limited groups and activities.

The Initial Outcome

Production work stopped in January 1994 and the final group of individuals and staff moved into the satellite sites in April. The first year was a learning experience for both staff and consumers. Consumers expanded their knowledge and experiences through an array of community activities and staff developed a much clearer sense of each individual's interests, skills, and preferences. Unfortunately, the immediate priority of providing day support and lack of experience and confidence in developing job opportunities resulted in employment rates increasing only slightly to between 35-40%. Families and funding sources were concerned with both the persistently high unemployment rate and the type of day supports provided. Staff were frustrated with unsuccessfully trying to balance day support and supported employment services simultaneously and staff turnover increased. The agency's contracts were up for re-bid with the Department of Mental Retardation, and at least one competitor was planning to bid for these contracts, with the intention of developing a new workshop in the area.

Step Two In The Change Process

The agency again restructured its services to devote more time and resources to community employment while meeting the need for day support. A new program called Community Options was created to provide the day support to individuals during the time they were unemployed. These services were primarily funded through Medicaid. A site was leased to serve as a central location for Community Options, but emphasis was placed on providing the majority of skill training,

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clinical, social and recreational services either in individual's homes or in the community. For those individuals who did not qualify for Medicaid services, the Department of Mental Retardation paid for this service. This allowed the five employment services teams to focus solely on career exploration and planning, job development and supports.

The Outcome (And Next Steps)

The agency was awarded a provisional one year contract contingent upon reaching an 80% placement rate within 12 months. At the same time, MetroWest Mental Health Center (of which this agency was now a part) was bought by a national for-profit health care company. The Executive Director left and a new director was appointed who had a strong background in community-based services. A year later, employment rates had more than doubled and nearly 80% of individuals served were working in community jobs, This employment rate is significantly higher than any other Department of Mental Retardation funded provider in the region.

Despite the success, the agency believes there is still much to be done. Many individuals in the day habilitation program want the opportunity to work. Twenty per cent of job seekers in the employment services are still unemployed. Also, many of the individuals who are already employed need better jobs. With the support of a project with ICI and the Massachusetts Supported Employment Systems Change Grant, efforts have begun to address these issues. A 30 hour intensive in-service training program has been developed to provide better training to staff in job development and natural supports strategies and funding has been obtained from the state vocational rehabilitation agency to place and support five individuals served in day habilitation (four of the five are now employed in the community).

What Can Be Learned from the Experiences of Columbia MetroWest

Leadership needs to include both a strong philosophical base to guide the agency's action and individual(s) willing to act and take risks.

In the case of MetroWest, these qualities didn't reside in the same person. The Executive Director was the one who was willing to take the risks, but it was two key middle managers who had the vision for what the agency could become. What made this work was that the three were willing to challenge each other, work together, and bring out each other's strengths.

There needs to be the right constellation of leadership at different junctures in an agency's transformation and throughout the levels of the organization.

The first Executive Director had the qualities that let him make what was a very risky and somewhat unpopular change (closing the workshop). He had the skills to both convince the Board and stand up to the opposition. The current Executive Director has a stronger program orientation and her efforts and strengths lie in developing staff and services that support the continued improvement of the lives of individuals served by the agency. If the positions of the two were switched in time, neither would have been as effective. A core group of middle management staff have stayed with the agency and provided consistency. Leadership at the front line has been developed through the hiring and training of direct service staff into the team leader positions. The majority of the team leaders are staff who were there prior to 1992 and who believed in the direction in which the agency was heading.

Having a detailed plan for the eventual structure of an agency is not necessary to begin the change process.

Organizational restructuring must often go through several stages, with the outcome of each change providing new ideas and options for the next step. For MetroWest, it took numerous programmatic and structural changes for the agency to conceive of and implement it's current situation. It was the struggle that resulted from supporting people without jobs that forced the agency to look at other options.

Attitudes and beliefs get shaped by experience, and many agencies need to test the efficacy of old beliefs before they can adopt a new belief system.

It was only after MetroWest made several attempts to shape behavior in the workshop that

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many of the staff and administration became convinced that this could not work. In the same way, the agency had to try to make enclaves and an affirmative business work before they could give up on the need for a protected work environment and instead focus on individual jobs in the community.

Staff, families and funding agencies have a harder time adjusting to changes than individuals served.

The overwhelming majority of consumers responded positively to new experiences and expectations, evidenced by a significant decrease of "behavioral" problems while in the community. MetroWest's experience points out that professionals and families may underestimate the abilities and resilience of individuals with disabilities and fail to acknowledge their own uncertainties about change.

During major organizational change, an agency should expect, and perhaps welcome, personnel turnover.

New values, services and structures require different skills and demands of staff. Despite a strong effort to retain staff, the agency experienced much stress and distress with the increased turnover. However, as the agency has become more successful in achieving its goals, it has been more able to hire and keep staff who have the values and skills to do their jobs well.

Major organizational change cannot be successful without continued internal and external marketing. However, organizational change cannot wait until all parties are in agreement, or change will never occur.

Extensive time and efforts went into informing consumers, families, and funding sources and adjusting the agency's plans to meet the concerns of these groups. However, the series of changes were made without the full support of these groups. Though funding sources were a major impetus for the changes, they also were some of the more vocal detractors of the agency when the initial conversion efforts were not an immediate success. Disgruntled family members have supported the idea of starting another workshop in the area, and a number of families decided to seek services elsewhere.

In order to move ahead, difficult compromises have to be made.

Two major concessions were made by MetroWest in order to move ahead with their plans to close the workshop. The agency had to promise to provide 9-3 day support, even though management knew at the time that it would negatively impact its ability to raise community employment rates. The second, and more difficult compromise, was increasing the number of people served in day habilitation. In designing the new organizational structure, management came to the conclusion that they only had the resources to support participants at a one to five staff to consumer ratio, thus not being able to provide supported employment services for individuals who needed greater supports. This meant that there were some participants who were referred to day habilitation even though they had both the desire and capability to work. These two compromises ran contrary to both the mission and values of the agency and the efficacy of their efforts to expand community employment opportunities, but they were necessary steps at the time so that the agency could move forward.

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